



MICHIGAN SCHOOL BUSINESS OFFICIALS



Financial Resources Conference

November 28, 2016

Robert Dwan
Associate Executive Director
Michigan School Business Officials



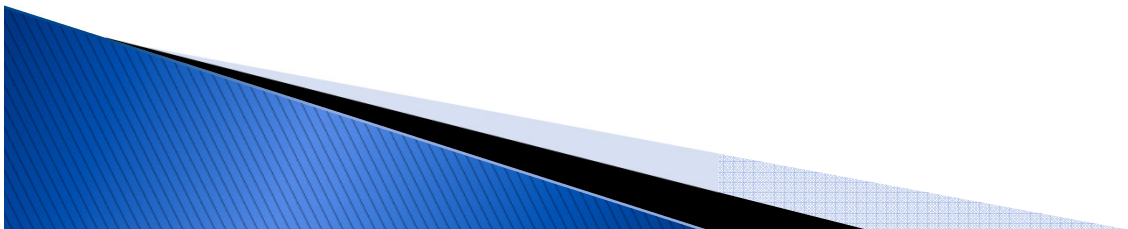
Michigan School Business Officials

What is MSBO?

Michigan School Business Officials was founded in 1937 as a nonprofit corporation to serve the multifaceted interests of education. It is our intent to serve all of our members to the best of our ability, to provide a forum for the exchange of ideas, and to provide opportunities for our members to expand their professional horizons in the public education sector.

MSBO MISSION STATEMENT

The Mission of MSBO is to continually improve the leadership of and management in school business and operational services, while enhancing the professional, social, and economic well-being of its members.





Who Do We Serve?



MICHIGAN SCHOOL BUSINESS OFFICIALS
1001 Centennial Way • Suite 200 • Lansing, MI 48917
517.327.5920 • Fax 517.327.0768 • www.msbo.org

Membership Application

July 1, 2016 - June 30, 2017

STEP 1: Complete the information below

☐ Miss ☐ Ms. ☐ Mrs. ☐ Mr. ☐ Dr.

Name: _____

Title: _____ MSBO ID: _____

District/Company: _____

Address: _____

City/St/Zip: _____

PIC (Personal Identification Code): _____

Work phone: _____

Cell Phone: _____

Fax: _____

Email: _____

First name for badge: _____

- ☐ Business ☐ Facilities ☐ Food Service ☐ Human Resources
☐ Public Safety ☐ Purchasing ☐ Superintendent ☐ Technology ☐ Transportation



Who Do We Serve?

ACTIVE MEMBER

- **Active Membership**
 - Employed by a Michigan school, college or university, or state agency
- **Contract Associate Membership**
 - Individuals not directly employed by a school or district, but working in the capacity of an active member; listed with school district information.
- **Student Membership**
 - Full-time college students not working in a school district; must submit transcripts
- **Emeritus Membership**
 - Retired and former Active MSBO members
- **Emeritus Life Membership**
 - Renewals of Life memberships only
- **ASBO Membership**
 - Includes annual membership in ASBO; 12 months regardless of when your ASBO membership expires
- **MAPT Membership**
 - Active Individual membership in MAPT



Michigan School Business Officials

Who Do We Serve?

ASSOCIATE MEMBERS

Associate Members are those employed in a business, not an educational institution. All Associate Memberships include a listing on the [School Purchasing Pages](#). Membership remains with the company. [Renew online](#) or complete the [2016-17 membership application](#) and Company [Data Sheet](#).

Product & Services Codes in [Alphabetical Order](#) or [Numerical Order](#).



What Are the Benefits?

ACTIVE MEMBER BENEFITS

- **Professional Development:** Get the latest information through [MSBO workshops and conferences](#), including the MSBO Annual Conference with more than 250 topics presented and over 300 exhibits providing products/services for school districts.
- **Advocacy:** MSBO represents its members on a wide variety of oversight and advisory committees (MDE, MISEC, MIEM, CEPI, MPSERS, MILAF+, Education Alliance, 1022 Committee, and others).
- **Professional Certification:** [14 separate training tracks](#) are offered: three for business office personnel, two for pupil accounting, plus food services, operations, facilities, transportation, payroll specialist, human resources, technology managers, purchasing and educational data.
- **Networking** through MSBO [Committees](#) and [Regional Groups](#) and [Listserves](#) connect you with members in your field and region of the state. Sign up for one of our listservs to share information and learn from your colleagues by emailing Lillie Rapelje at lrapelje@msbo.org.
- **Business Solutions:** MSBO offers products and services that benefit school districts, including BidSync, Bus Purchase Program, Dynamic Budget Projections, Michigan Schools Energy Cooperative, MILAF+, PaySchools, Public Surplus, Purchasing Cards, SafeSchools, School Finance Reference Manual, SchoolDude.com and U.S. Communities.
- **Information:** Timely information through the MSBO newsletter (published monthly), e-News & Notes e-mails, MASA Leader (available @ \$30/year), and the MSBO website. Look up member companies in the [Membership Directory](#) and the [School Purchasing Pages](#).



What Are the Benefits?

ASSOCIATE MEMBER BENEFITS

- **School Purchasing Pages:** Every Associate member is listed on our [School Purchasing Pages](#), an online directory of products and services available from our members.
- **Sponsorships & Exhibiting Opportunities:** MSBO members receive the first opportunities to exhibit at and/or sponsor a variety of events.
- **Information:** Timely information through the *MSBO newsletter* (published monthly), *e-News & Notes* e-mails, *MASA Leader* (available @ \$30/year), and the MSBO website.
- **Contact Information:** Look up members and member companies in the [Membership Directory](#). Purchase, for a nominal fee, labels for mailing to our Active members.



Professional Development



Michigan School Business Officials

2016-17

CALENDAR OF EVENTS

1001 Centennial Way,
Suite 200
Lansing MI 48917
www.msbo.org

Ph: 517.327.5920
Fax: 517.327.0768



Professional Development

June

Financial Statement Preparation Workshop

Statement of Auditing Standards #112 requires school districts to be able to prepare their own financial statements. If a district cannot prepare their own, they have a control deficiency. This CPA-designed workshop gives schools the information they need to satisfy this requirement. Your professional reputation and higher auditing fees may be “on the line.” Annual attendance will help you meet this requirement.

Business Manager/CPA Workshop

Timely information for practicing CPAs and business managers in preparing for successful year-end and financial statement preparation is the focus of this workshop. Important topics include reporting issues and concerns from the state’s audit reviews, accounting and auditing related updates, key compliance and finance-related issues, data submission issues, Bulletin 1022 Chart of Accounts and State Aid computation, Michigan School Auditing Manual, and GASB updates.



Professional Development

September

Introduction to School Business

The Introduction to School Business Conference is designed for new business officials (within the first few years of employment), office staff, and those who want a basic information refresher.

Program content includes:

- **Overview of School Business:** Get an understanding of the major functions of school business officials including an overview of human resources and technology. Learn how to survive the personal and professional politics of your job, and learn how the Michigan Department of Education and the Michigan Legislature affect education.
- **School Law and Revised School Code:** An overview of the major state and federal laws that govern school operations with a focus on the Revised School Code.
- **Fund Accounting:** An overview of fund accounting concepts, financial reporting issues, & highlights the fiscal health attributes used by savvy business managers.
- **Organizational and Site Issues:** How to enhance business office productivity; monitor & manage your budget and operation; work with your site operation's personnel (principals, cafeteria, facilities and transportation offices).



Professional Development

October

MDE/MSBO Workshop

Get the latest from the Michigan Department of Education (MDE) on state aid, 1022, and other hot topics. Take advantage of this opportunity to meet face-to-face with the people at MDE you work with all year.

January

Financial Strategies Conference

The Financial Strategies Conference provides useful information just in time for negotiations and your budget process – tools that will help maximize your effectiveness as your district's school business leader. Get the latest information on economy, budget, state aid, legislation and other hot topics. Includes two breakfasts and two lunches.



Professional Development

February Property Tax Overview

With the ever changing environment of property tax laws, rules and regulations, do you have the latest information? Learn the basics of how property taxes affect your districts funding, as well as a more advanced look at specific tax and other tax financing methods. Forms used for levying your district millages, how the levy impacts the State Aid calculation and details on how to reconcile your overall tax revenues is part of this workshop. Presenters include property tax experts and school practitioners and content is geared for both K-12 and ISDs.



Professional Development

May

MSBO Annual Conference & Exhibit Show

Join us at MSBO's 79th Annual Conference. On Tuesday, May 2, we'll have certification classes and Pre-Conferences, followed by the Conference on May 3-4. Get the latest information on the economy, best practices in school districts, school aid, legal issues and products and services. We look forward to seeing you in Grand Rapids!



Professional Development

MSBO CERTIFICATION PROGRAM

GENERAL INFORMATION

MSBO certification is a voluntary system, established in 1998. It provides focused training to school business officials in order to:

- Offer practical information that will help school business officials succeed and excel in their employment; and
- Establish a basis for advancing professionalism of school business officials and assuring school districts that current or prospective business officials have a base of knowledge about laws, regulations, and procedures for functioning in a Michigan public school



Professional Development

MSBO CERTIFICATION PROGRAM

The MSBO certification program provides information to school business professionals at the beginning of their careers and to assure continuing professional development throughout. In developing the program several guidelines were used:

- Provide access to information needed to succeed on the job in the first three years.
- Offer practical overviews of key areas of law, regulation, and practice.
- Identify resources for in-depth and additional information that may be utilized at a later time.
- Assure a quality curriculum is developed and monitored by the MSBO Professional Development Committee.
- Use experienced practitioners to teach classes.
- Offer classes at regular intervals and reasonable prices.
- Utilize adult learning principles and provide a learning environment where colleagues can share experiences and information.



Professional Development

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LEADERSHIP INSTITUTE

The MSBO Leadership Institute is designed to help members reach that next level in their professional and personal life through a rigorous and challenging curriculum that will help them grow as leaders and implement solutions. It includes face-to-face group sessions focusing on specific leadership themes, an online learning community and individual personal coaching sessions.

MSBO Associate Executive Director Scott Little discusses MSBO's Leadership Institute with executive coach David Hulings of Hulings and Associates.

Video One: [Overview of the Program](#)

Video Two: [Personal Coaching](#)

[Click here](#) to see the list of cohort graduates.

APPLICATION INFORMATION

Click here to download the [Application](#).

- November 18, 2016 — Application Deadline
- December 1, 2016 — Notification of Acceptance
- December 1, 2016 — January 15, 2017 — Take Leadership Style Assessments
- December 1, 2016 – January 15, 2017 — Be available for the first of five one-on-one coaching sessions.

MEETING DATES AND LOCATIONS

RELATED DOCUMENTS



[Leadership Insitute Application](#)



[LI Sponsorship 2017.pdf](#)

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Renew Your Membership Online! Or complete a Membership Application. You can pay your ASBO International membership dues when you renew your MSBO membership.

Become a member of MSBO today!

Learn more about member benefits.



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Hot Topics

- [School Aid Fund 2016-17 Budget Documents](#)
- [May Consensus Revenue Estimating Conference](#)
- [Group Solutions - Letter to Brian Whiston Top 10 in 10!](#)
- [GASB 68 – Auditor General Audit Report – Schedules of Employer Allocations and Schedule of Collective Pension Amounts as of September 30, 2014](#)

Hot
Topics

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SCHOOL FINANCE

STUDIES OF SCHOOL FUNDING

- [Michigan Education School Finance Study – APA Consulting](#) (posted 6/28/16)
- [University of Nevada - 50 State Look at How States Finance their Schools](#) (posted 9/21/15)
- [Link to 50 State Survey Page](#) (posted 9/21/15)
- [The Road Toward K 12 Excellence in Michigan](#) – Upjohn Research Institute (posted 9/21/15)
- [Recommendations for How to Improve Michigan's Education System](#) – Public Sector Consultants (posted 9/21/15)

FEDERAL FUNDING INFORMATION

- [MDE Uniform Guidance for Federal Grant Funds – May 26, 2016](#)

SCHOOL DISTRICT AUDITORS

- [School District Auditor – Contact Information](#)
- [Listing of School Districts by Auditor](#)

MILAGE LEVY INFORMATION

- [LEA millage information 2016 – Tax Year 2015](#) (posted 8/31/16)
- [ISD All Tax Revenue Information – January 2016](#) (posted 1/25/16)
- [LEA millage information 2015 – Tax Year 2014](#) (posted 1/25/16)

MPSERS EMPLOYER CONTRIBUTION RATES

RELATED PAGES

- [403\(b\)](#)
- [Advisory Workgroup](#)
- [American Jobs Act](#)
- [Best Practice](#)
- [E 911 Mandate](#)
- [Early Warning](#)
- [Education Achievement Authority](#)
- [Education Jobs Fund](#)
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- [School Aid Act Rewrite](#)
- [School Aid Fund \(07-08\)](#)

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BUSINESS SOLUTIONS

Information about products and services offered by MSBO. For detailed information about individual products and services click on the logos or related pages.

BIDSYNC

3BidSync offers maximum flexibility in a streamlined, web-based RFP and bidding system.

BUS PURCHASE PROGRAM

Save time and money by providing a quality base bus with over 200 options to choose from. All the bidding has been done for you.



COMPLIANCE TRAINING GUIDE

This guide is designed to help schools identify education and training that is required for Michigan schools.



DYNAMIC BUDGET PROJECTIONS

A financial model that provides multi-year budget projections in an Excel template.



HIRING SOLUTIONS

RELATED PAGES

- [BidSync](#)
- [Bus Purchase Program](#)
- [Compliance Training Guide](#)
- [Dynamic Budget Projections](#)
- [Hiring Solutions](#)
- [MILAF Plus](#)
- [MISEC](#)
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SUPPORT SERVICES

Your source for information on:

BUS PURCHASE PROGRAM

The [MSBO Bus Program](#) is open from October 3, 2016 to January 31, 2017.

TRANSPORTATION

This includes the MSBO Bus Purchase Program, Transportation Benchmarking Surveys, MSBO Transportation Committee, Bus Leasing Analysis, Mechanic Certification, and a variety of publications and resources.

FACILITIES

This includes the Facilities Benchmarking Reports and Worksheet, Maintenance & Operations Cost Studies by ASU, Custodial Certificate Program, Construction Bidding & Agreement Forms, MRSA, IPM, Best Practices, as well as policies and other resources. You will also find energy information, including sample energy policies, energy conservation measures, Michigan School Energy Cooperative (MISEC) information, a variety of resources for energy program management, high performance buildings and much more.

FOOD AND NUTRITION SERVICES

This includes the MSBO Food & Nutrition Committee, Food Laws & Regulations, Food Service automation, contracting with food service management companies, and MDE, Michigan and Federal resources.

RELATED PAGES

▼ [Facilities](#)

- [Energy Management](#)
- [Grounds](#)
- [Facility Managers-Down River](#)
- [Facility Managers-Macomb/St. Clair](#)
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Learn more about member benefits.

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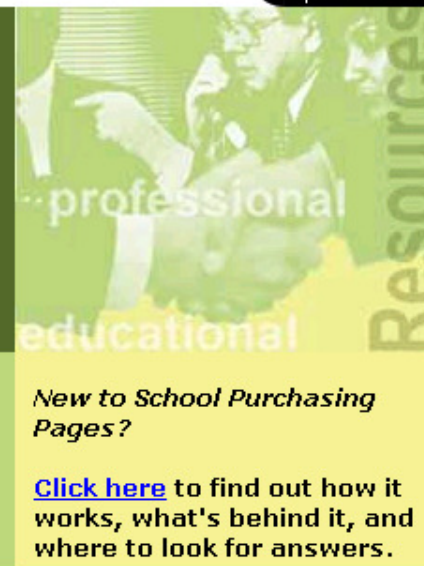
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Welcome to Michigan's only complete online educational resource linking districts to the products and services they need.

If you experience difficulties during our current testing phase, please bear with us. [Contact us](#) with questions.

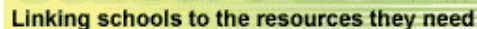


New to School Purchasing Pages?

[Click here](#) to find out how it works, what's behind it, and where to look for answers.

School Purchasing Pages
1001 Centennial Way, Suite 200
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(517) 327-5920 | Fax: (517) 327-0768

The School Purchasing Pages contain a variety of links to other Web sites and references to resources available through government, nonprofit, and commercial entities. These links and references are for informational purposes only and are being provided for the convenience of the user. Their inclusion does not constitute an endorsement by the MSBO of the sites or the information contained therein. Reliance on any of the information contained in the sites is at your own risk and the MSBO disclaims any responsibility for the accuracy or completeness of any information obtained through the links.



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Fill in one of the product categories below to display a listing of associate members that provide the product or service.

Use the fields below to search the School Purchasing Pages database, at least one search field is required. More fields will return fewer responses.

When you click on the [Dust Control](#) link, you can go directly to the Early Learning Furniture or services. If you are eCommerce Purchasing or click [here](#) to sign up. Education Technology Educational Graphics Systems Election Printing & Supplies MASA page. From there about their products his Web site, please rs of MSBO and

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 Drying - Structural
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 Dust Control
 Early Learning Furniture
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Manual



Instructions for the Manual Page



Download a copy of "Legal Issues in Purchasing" by Patrick Higdon of Clark Hill PLC in Microsoft Word or pdf format.



  Legal Issues in Purchasing

Download samples of purchasing manuals used in Michigan school districts. These manuals are available Microsoft Word or pdf format.

If you have a purchasing manual you would like to add, please send it to Deneen Hansen at dhansen@msbo.org

  Employee Handbook - Transportation

  Purchasing Handbook

  Student Handbook - Transportation

School Purchasing Pages
1001 Centennial Way, Suite 200
Lansing, MI 48917-9279
(313) 337-5000 x.15 (313) 337-0300

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Policies

Instructions for the Policies Page

Download your sample policy in Microsoft Word or pdf format. You can customize any of these policies for your district.

- Cooperative Purchasing
- Credit Card Policy
- Determining Lawful Expenditures
- Local Purchasing
- Procurement Cards
- Purchase of Goods and Services
- Purchasing Policy
- Vendor Application
- Vendor Relations

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Fax: 734.769.8801
Email: info@schoolpurchasingpages.org

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RFPs

Product and Services Categories

Instructions for the RFP Page

Click on one of the product categories below to display a listing of RFPs. You'll also get a list of companies that may provide the designated product or service.

Download sample RFPs in either Microsoft Word or in pdf format.

If you have a sample RFP to be added to this list, please send them to Deneen Hansen at dhansen@msbo.org

--- Please select a category ---
--- Please select a category ---
Administrative Software
Asphalt - Paving
Asphalt - Line-Stripping
Asphalt - Repair
Asphalt - Seal-Coating
Athletic Field Maintenance
Athletic Fields/Equipment
(51) Auditing & Accounting Services
Banking Services
Bleacher Services

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Business Solutions

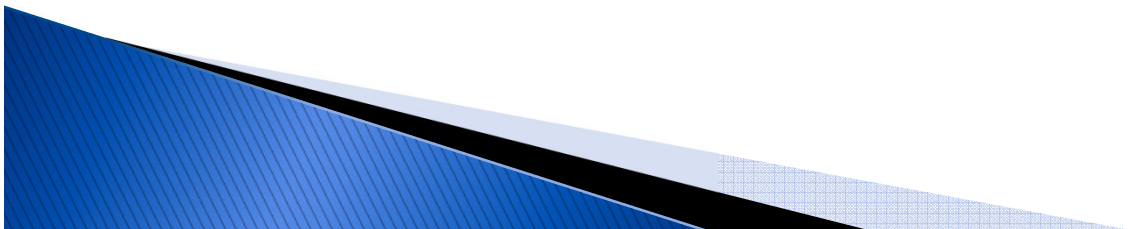


Dynamic Budget Projections



PaySchools

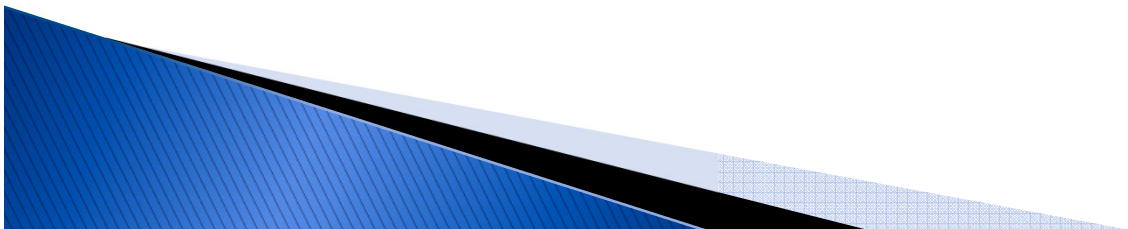
This online payment processing system that provides schools with an easy and efficient method to collect fees and receive electronic payments for school lunches, field trips, registration, prom tickets, T-shirts and any other school-related fees. PaySchools makes it possible for all schools to offer parents the convenience of online purchasing without incurring large administration or setup costs.



Michigan Purchasing Card Consortium



MSBO is pleased to make available the Michigan Purchasing Card Consortium, led by MSBO, with MASB and MASA as partners, along with JPMorgan Chase as the provider for our statewide program. The program is open to all school districts, and provides enhanced internal controls over the purchasing process, while offering flexibility to district staff. Reduced administrative time in processing purchases adds up to time savings with business office. The program also offers a rebate based on total spent.



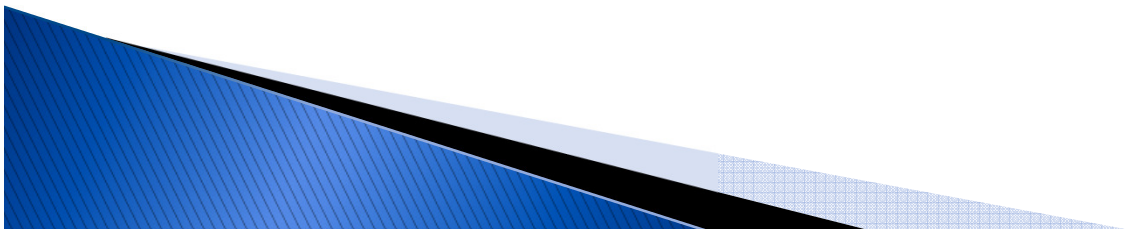


Michigan Liquid Asset Fund

The Michigan Liquid Asset Fund ("MILAF+" or the "Fund") is a comprehensive cash management program that was created in 1987 by the Michigan Association of School Boards.

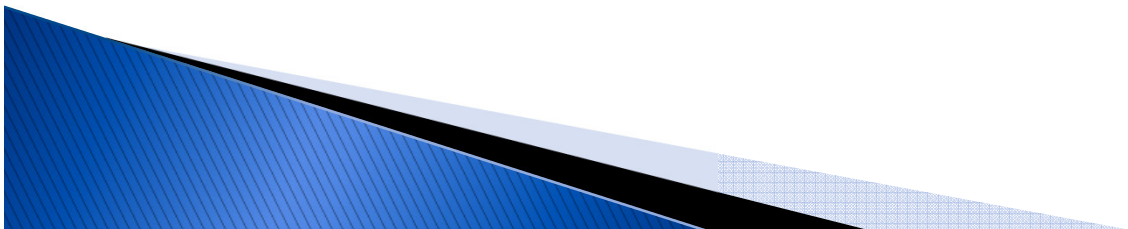
MILAF+ offers its participants a professionally managed portfolio with two share classes– the Cash Management Class that provides unlimited check writing privileges and the MAX Class which offers a competitive money market rate. Both share classes stress "safety of principal" as the number one objective and the portfolio comprising both share classes is rated AAAm* by Standard and Poor's.

Additional fixed income investment products are available through the Investment Adviser to assist MILAF+ participants in seeking to maximize results.



Dynamic Budget Projections

An exciting tool for school districts to use for financial forecasting. This program was designed exclusively for Michigan school districts and is available only through MSBO. Forecasting, assumption based budgeting “changes on the fly” are all benefits of this easy to use system. Truly a Best Practice.”





Michigan School Business Officials

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